How to Expand Presales Influence on Retention

Re/prise

Table of Contents

The single-threaded influence trap: Why it matters to customer retention

BY
Chris Mabry
VP of Solutions and Partnerships at Reprise

As solution consultants and solution engineers (SEs), we influence product, sales, marketing, customer success (CS), and more. We understand the varied needs within the business. Yet, all too often, solutions consulting is focused on new revenue when retention revenue could be an equally important area of influence.

The greatest challenge is: How do we demonstrate our value when it comes to retaining customers?

Three reasons SEs should care about retention

Solutions consulting should play a role not only in securing new revenue, but retaining existing customers. Continued collaboration with teams like CS and product can result in big rewards for the entire organization.

1. **Renewals = the key to ARR growth**
   You can't grow ARR if you aren't retaining customers. Fortunately, retaining customers is easier and cheaper than acquiring new ones. Renewals drive predictable revenue and reduce pressure on new sales — all while opening the door for expansions and upsells.
2. **Product champions reduce churn**
   Customers who deeply understand and advocate for your product are less likely to leave.
3. **Customer feedback fuels innovation**
   Customer insights help improve the product and increase retention. SEs bridge the gap between users and product teams.

Many of us are caught in **a trap that I call "single-threaded influence" — and one I want to leave behind in 2025.** Single-threaded influence represents presales teams who are doing demos or executing on their tasks, and then moving onto the next deal without continued engagement with the customer. Solutions consulting has the ability to empower the entire customer journey, and oftentimes they are doing just that, but not tracking it.

I'm calling for a shift in mindset, and a way to clearly tie presales influence to retention metrics that move the needle: Gross Revenue Retention (GRR), Net Revenue Retention (NRR), and Customer Lifetime Value (LTV). These metrics are especially important in an economy where most SaaS companies focus on sustainable revenue growth, driven in large part by satisfying existing customers.

When you attach yourself to high level, business-driving metrics, you're no longer bouncing between demos or activations. You're spreading the wonderful influence and knowledge you already have across the organization. In case you missed it, the first eBook in this series was focused on expanding influence on revenue. I'd encourage you to check it out!

What can you expect for this eBook?

- A step-by-step framework for expanding presales influence on retention.
- Practical advice from presales leaders who have moved from transactional to strategic roles.

Let's get started!

Step 1

Set goals and achieve alignment

The first step toward expanding SE influence on retention is setting a clear goal to drive impact. Start by identifying the areas where SEs can have the most measurable effect on retention. To do this effectively, review past performance and pinpoint opportunities for improvement. Before SEs can influence retention, they need clear objectives aligned with broader customer success strategies.

Here are key focus areas to consider:

1. Alignment with revenue goals

Ask yourself: How can we align better with customer success leadership to expand SE influence on retention?

Participate in retention processes
Ensure SEs are included in renewal strategy discussions, health checks, and QBRs. Their insight into customer engagement and technical adoption trends can strengthen retention efforts.

Partner with CS, Product, and Account Management
For example, SEs can support CS in identifying technical blockers early, provide Product with real-world insights into customer needs, and work with account management to uncover expansion opportunities. Cross-functional collaboration keeps SEs engaged beyond the initial sale and driving long-term customer success.

2. Identifying churn risks early

Ask yourself: How can we act as technical advisors who identify and mitigate churn risks before they escalate?

Prevent low feature adoption
SEs can proactively offer tailored training sessions, interactive demos, and technical workshops that help customers fully understand and use key product features. By identifying underutilized features early, SEs can address gaps before they become reasons for churn.

Avoid support escalations
As proactive technical advisors, SEs can help customers troubleshoot common issues before they escalate into major support tickets. Hosting "Ask Me Anything" sessions, maintaining knowledge bases, and providing direct guidance to users can significantly reduce reliance on reactive support.

Increase product engagement:
SEs can integrate themselves into CS initiatives, monitoring product usage trends, and recommending features that align with evolving customer needs.

3. Enhancing customer education and enablement

Ask yourself: How could we establish programs that drive continuous customer engagement?

Self-serve interactive demos and technical workshops for existing customers
Provide customers with on-demand, interactive demo environments focused on specific use cases. Technical workshops led by SEs also support customers by addressing common challenges and making sure they make the most of the features at their disposal.

Customer certification programs
Establishing certification programs helps customers develop deep product expertise and become product champions. According to Forrester Research, customer education programs can improve top-line revenue by an average of 7.6%.

4. Creating a seamless presales-to-CS handoff

Chances are you've had this issue before: "Every time we throw the ball over the fence, we introduce risk." Ask yourself: How can we improve the transition from presales to CS?

Presales knowledge transfer meeting
After a deal is won, conduct a 30-minute session with the CS team to frame the customer's use case, key technical needs, and known challenges.

Shared customer profile
Documenting product gaps, past demo discussions, and customer expectations in a shared workspace — even if it's as simple as a Google Doc — can help make the transition much smoother.

Joint customer kickoff and reviews
Creating opportunities for the SE to join the CS team in the initial customer onboarding call or QBRs can provide technical continuity. For example, SEs can check that product adoption aligns with the original demo and sales discussions.

5. Refining the ideal customer profile (ICP) for long-term success

Ask yourself: How can we help identify the customers most likely to succeed and renew?

Using customer insights to refine ICP
SEs interact directly with customers and prospects, putting them in the best position to understand customer needs and behaviors. By tracking recurring themes from customer interactions, SEs can help refine ICP criteria to target prospects who are more likely to see long-term success with the product.

Ensuring long-term product fit
SEs can track customer sentiment and technical blockers post-sale to provide product teams with feedback they can use to improve the product. By identifying patterns in customer challenges, SEs can help the product team align more closely with the needs of long-term, high-value customers.

Running after problems: How SEs tackle retention head-on

BY
Nicholas Zona
Assistant Vice President, Pre-Sales Solutions Consultants, Equifax Inc

We all know the stark reality: clients don't leave on a whim. Churn is a complex tapestry woven from multiple threads – unmet expectations, communication breakdowns, competitive pressures, and a general lack of perceived value. It's rarely a singular, dramatic event. Rather, it's a slow erosion of trust and satisfaction, a gradual drifting away.

While understanding the "why" behind client departures is crucial, it's equally important to examine the "how" of effective retention. What I'm witnessing in successful retention strategies is a shift towards proactive engagement, a willingness to tackle challenges head-on, and a relentless pursuit of client satisfaction. In essence, it's about "RAP": Running After Problems.

This "RAP" mentality transcends simply responding to client complaints. It's about anticipating potential issues, identifying warning signs, and proactively addressing them before they escalate. It's about cultivating a culture of vigilance, where every team member is empowered to identify and escalate potential problems.

Solution Consultants, with their deep understanding of client needs and technical expertise, are ideally positioned to embody this "RAP" approach. They can:

1. **Conduct proactive health checks**
   Regularly reviewing client usage and identifying potential issues early.
2. **Facilitate knowledge transfer**
   Ensuring clients are fully utilizing the solution's capabilities.
3. **Provide rapid technical support**
   Addressing issues quickly and efficiently.
4. **Collaborate with Account Management**
   Sharing insights and developing joint strategies for retention.

By embracing this proactive, partnership-driven approach, and empowering Solution Consultants to play a vital role in retention efforts, organizations can build stronger client relationships, reduce churn, and drive sustainable growth. The shift from vendor to partner is not just a buzzword; it's a fundamental change that is essential for long-term client success and organizational prosperity.

Step 2

Work collaboratively with customer-facing teams to achieve retention goals

To maximize retention influence, SEs should work across customer success, account management, and product teams.

Establishing structured councils improves ongoing collaboration. Let's take a few of the goals we've outlined above as an example and build them out into an actionable plan for implementing a council.

Structure the SDR Enablement Council

A Customer Expansion and Adoption Council makes it possible for presales teams to drive value beyond the initial sale. By bringing together key stakeholders, the council focuses on improving adoption, reducing churn, and driving expansion revenue. The goal is to improve collaboration between SEs, CS, account management, and product teams — and ultimately to proactively address customer challenges, rather than retroactively manage them.

Participants
SEs, CS leaders, Account Managers, Product Managers

Format
Monthly working sessions and ongoing Slack/Teams collaboration

Defining the charter

Create a charter document outlining what you hope to accomplish. For example, it might include elements such as:

Purpose
Ensure presales insights continue shaping post-sale customer success.

Goals

- Increase adoption rates and expansion revenue.
- Address technical blockers before they lead to churn.
- Improve knowledge transfer from presales to CS.

Meeting agenda

Customize this sample example meeting agenda to make this council fit your organization's needs.

- Review adoption health metrics.
- Identify customers at risk of low engagement.
- Discuss feature requests and roadmap influence.
- Plan expansion and upsell enablement sessions.

Establishing SE-driven customer retention initiatives

Based on the outcomes of your council, you can define specific customer retention initiatives driven by presales leadership and team members.

Why define customer retention activities for SEs?

BY
Pam Dunn
Head of Solutions at Lorica Cybersecurity, and member of WISE (Women in Solutions Excellence)

When we define those activities based on the relationship, the SEs feel better equipped and empowered and have the time to prepare for these as they would any net new business. I think any actual training and implementation work should not be on the SEs to deliver but I believe in cross collaboration with all teams so they can learn from each other. SEs learn better stories from their implementation teams, while those teams learn what Presales and Sales are leading with. All teams should feel responsible for the customer and for their continued partnership with us.

When we define those activities based on the relationship, the SEs feel better equipped and empowered and have the time to prepare for these as they would any net new business. I think any actual training and implementation work should not be on the SEs to deliver but I believe in cross collaboration with all teams so they can learn from each other. SEs learn better stories from their implementation teams, while those teams learn what Presales and Sales are leading with. All teams should feel responsible for the customer and for their continued partnership with us.

Scaling the technical enablement program

A well-structured technical enablement program makes sure your customers are getting value from your product, reducing churn, and increasing adoption. As outlined above, SEs can lead initiatives to address knowledge gaps and improve user engagement. These could include:

On-demand technical workshops tailored to customer segments
SEs can design interactive workshops that cater to specific customer needs, giving users the technical know-how to make the most out of their product. These sessions help customers navigate advanced features, optimize configurations, integrate third-party tools, and troubleshoot common issues before they escalate.

Customer certification programs to deepen engagement and advocacy
By establishing a certification framework, SEs empower customers to become product experts. Certified users gain deeper knowledge, which leads to increased product stickiness and advocacy. As they champion the product internally, retention and expansion opportunities naturally follow.

Self-serve interactive demo libraries for continuous learning
Providing a hands-on demo library lets customers explore features at their own pace. Interactive product experiences help reinforce learning, encourage product experimentation, and make customers feel confident in using the product.

Running “Ask Me Anything” (AMA) sessions for customers

Hosting regular AMA sessions gives customers direct access to SEs and resolves technical concerns before they become roadblocks.

One common challenge SEs can address in these sessions is troubleshooting feature adoption issues. Customers often struggle with configuring advanced settings or optimizing integrations. In response, SEs provide hands-on walkthroughs, best practices, and tailored guidance to help them fully leverage the product’s capabilities.

Another frequent question might involve product roadmap. Customers want to understand how new features align with their needs. These sessions can create a feedback loop where SEs relay customer input to the product team to make sure product updates are grounded in actual customer requirements.

Partnering with product on feature adoption and feedback

As with the AMA example, SEs can serve as the bridge between customer needs and the product team. By systematically gathering and communicating important customer insights, SEs contribute to product updates that drive retention and expansion.

For example, SEs can communicate feature requests, usability concerns, and adoption barriers to the product team. In some cases, involving SEs in a customer advisory group can help them gather direct feedback from power users and technical champions. These customers can test early-stage features, provide structured feedback, and advocate for improvements.

Step 3

Use data to tie presales efforts to customer retention

SEs should always track their contribution to deals using metrics like GRR, NRR, and Customer LTV. But when it comes to measuring SE influence on retention, there are a few bespoke metrics you can consider tracking.

Here are 5 specific metrics you can begin tracking in 2025.

1. Customer adoption rate

Why It Matters: Demonstrates SEs' impact on driving post-sale customer success by ensuring active usage of key features.

How to Track

- Measure the percentage of customers actively using core features after purchase.
- Analyze adoption trends across different customer segments and align feature adoption with metrics like LTV.

Actionable Steps

- Conduct post-sale enablement sessions to reinforce product value.
- Provide tailored guidance to customers on high-impact features.

2. Feature utilization growth

Why It Matters: Ensures customers maximize value from the product, increasing retention and renewal likelihood.

How to Track

- Track feature adoption rates leading up to renewal cycles, and align these metrics with renewal metrics wherever possible.
- Compare usage data before and after SE-driven training sessions.

Actionable Steps

- Develop targeted educational content to boost feature engagement.
- Proactively guide customers on underused product features with interactive demos.

3. Churn reduction in SE-engaged accounts

Why It Matters: Proves the impact of SE involvement in reducing customer churn by solving technical blockers.

How to Track

- Compare churn rates between accounts with and without SE engagement.
- Identify patterns in customer loss due to technical challenges.

Actionable Steps

- Address recurring technical pain points proactively.
- Create knowledge resources to prevent common churn triggers.

4. Expansion and upsell influence

Why It Matters: Validates SEs' role in driving additional revenue through expansion and upsell efforts.

How to Track

- Measure recurring revenue (GRR, NRR) generated from SE-led expansion initiatives.
- Track the percentage of accounts increasing spend due to SE influence.

Actionable Steps

- Identify and act on customer needs for complementary solutions.
- Provide consultative guidance on expansion opportunities.

5. Support ticket deflection

Why It Matters: Shows how SEs reduce the burden on support teams by proactively educating customers.

How to Track

- Measure reductions in support tickets from SE-engaged accounts.
- Track improvements in first-time resolution rates.

Actionable Steps

- Develop SE-led training sessions to prevent common issues.
- Provide technical documentation addressing frequent customer questions.

It’s time to expand SE influence on retention

SEs are in a unique position to connect pre-sales promises to post-sales realities. When you align your efforts with key retention metrics, you can evolve from a transactional resource to a strategic driver of revenue growth. SEs who take ownership of customer enablement and technical success pave the way for expansion opportunities.

The strategies outlined in this eBook — such as establishing structured councils, improving customer education, and using data to drive insights — serve as a blueprint for SEs who want to broaden their influence. The shift from single-threaded influence to a more expansive, multi-threaded impact starts with intentions and execution.

It’s time for presales professionals to claim their position in revenue retention. Organizations that empower SEs to take an active role in customer success will see stronger renewals, healthier adoption rates, and a more predictable revenue stream.